

The Philadelphia Association of Paralegals'

***ANNUAL
EDUCATION CONFERENCE***

*Expanding Your Role as a
Paralegal Professional*

Friday, October 7, 2011 • 8 A.M. to 5 P.M.

Hyatt at the Bellevue

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An Invitation from the President

On behalf of The Philadelphia Association of Paralegals, we are extremely excited to be able to host this year's Education Conference at the Hyatt at the Bellevue. As you either know or can imagine, the space is quite impressive, and Friday, October 7th is practically guaranteed to be a fun and fact-filled day of learning and networking.

PAP has always been fortunate to draw the most knowledgeable speakers in the field, and this year's list is exceptional. Rather than repeating them here, they are summarized on the Registration Form on pages 35-36 of this brochure. All courses have been approved for 1.25 NFPA CLE credits, and this year, for the first time, we have four courses preapproved by the PA CLE Board for 1.00 credits each.

Did we say excited? Over the moon doesn't begin to describe our anticipation of the Keynote speech by Phyllis Sisenwine, MCC, a/k/a "The Lawyer's Coach." Don't worry – she is used to coaching paralegals too and the benefit of hearing her alone will be well worth attending this year's conference.

We are equally fortunate to have a full compliment of vendor sponsors with lots of giveaways (see Acknowledgments on page 7). PAP will also be raffling off one 2012 student membership and a PACE scholarship in the afternoon. Thanks to our sponsors, we are able to provide this conference at the same cost as in years past.

This year's Education Conference theme is "Expanding your Role as a Paralegal Professional." Hope to see you there!

Christine Flynn, *President*
and the 2011 PAP Board of Directors



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and be entered into our drawing for great prizes!*

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Association Acknowledgments

We would like to thank our Education Committee members, Judith Bardsley, Debra DiCicco, Maryanne Ebner, Christine Flynn, Kirsten Fullerton, Jana Henry, Tausha Major, Babette Pace, Anya Pollard, Elaine Sachs, Judy Stouffer, Kim Walker and Jana Henry for their assistance with the organization of the 2011 Education Conference.

We would like to thank our Keynote Speaker and all the other speakers for volunteering their time and efforts in making the Conference a success.

We would like to thank the following businesses for their continued support and contribution to this event:

Sponsors:

- Conestoga Bank (Continental Breakfast)
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We would like to thank DTI for the printing and distribution of our Education Conference Brochure.

I would like to extend a special thank you to Mark Viggiano for all his hard work, including his ad design for the Brochure's cover, and his ever-attentive layout design.

Lyndora Patterson Tiller
Education Committee Chairperson

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Guest Speaker

Phyllis Sisenwine

Phyllis Sisenwine of Powerful Solutions is certified by the International Coach Federation with the highest designation of Master Certified Coach. She has an international practice providing coaching services to lawyers and law firms who want to increase profits and improve performance. Her expertise in coaching lawyers has allowed her to be known internationally as “The Lawyer’s Coach.”

Phyllis brings to her clients the same level of enthusiasm and energy she brought to her sales career. As a top-producing sales professional for over 20 years Phyllis was often named “Salesperson of the Year”. She knows how to get results and helps lawyers and other professionals do the same.

In addition to being a successful business and life coach, Phyllis is a sought after Professional Speaker. She has addressed bar associations and law firms across the country. She is a contributing author of two books, has a workbook and audio program and has published over 36 articles. Phyllis is also a frequent radio and television show guest.

Phyllis welcomes your contacting her with any challenges you would like her to address on October 7th. Please contact her via: http://www.thelawyerscoach.com/just_ask.htm

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**The Philadelphia Association of Paralegals’
Education Conference
Friday, October 7, 2011**

SCHEDULE OF EVENTS

Registration: 8:00 A.M. – 9:00 A.M.
Grand Ballroom Foyer

Continental Breakfast: 8:00 A.M. – 9:00 A.M.
(Sponsored by Conestoga Bank)

* * * * *

Session I: 9:00 A.M. – 10:15 A.M.

Morning Break: 10:15 A.M. – 10:45 A.M.
(Sponsored by Legal Errands)

Session II: 10:45 A.M. - Noon

* * * * *

Luncheon: 12:00 Noon - 2:00 P.M.
Keynote Address by Phyllis Sisenwine
Grand Ballroom
(Sponsored by Transperfect)

* * * * *

Session III: 2:00 P.M. – 3:15 P.M.

Afternoon Break: 3:15 P.M. – 3:30 P.M.
(Sponsored by Summit Court Reporting)

Exhibitor Raffles: 3:15 P.M. – 3:30 P.M.

Session IV: 3:30 P.M. – 4:45 P.M.

* * * * *

Exhibit Area: 8:00 A.M. – 4:45 P.M.

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Seminar Events

Session I

9:00 a.m. to 10:15 a.m.

CORPORATE LAW

Seminar I-A

Business Entity Governance and Compliance

The State of Delaware is known as the “Corporate Capital” of the World. This seminar will provide information regarding why entities form/incorporate in the State of Delaware. The up and coming Nevada and Wyoming capitals will be reviewed, along with qualifying in other states and consequences of failing to qualify. The paralegal’s role in corporate governance, records maintenance and compliance will be covered, as well as annual reports and tax notices. Day-to-day practices, including proper service upon a company’s Registered Agent and paper vs. online filings will round out this seminar.

1.25 NFPA CLE Credits

1.00 PA CLE Board Credits

PETRONA VARELA, ESQUIRE

National Corporate Research, Ltd.

Ms. Varela is a corporate service specialist at National Corporate Research, Ltd., (“NCR”), a leading provider of nationwide registered agent, filing, research and library services. Her responsibilities include handling corporate filing and retrieval services along with processing requests for the legalization/authentication of documents for use in international transactions. As a member of NCR’s Training Department, Ms. Varela creates training materials and seminars and has been a presenter at public seminars on corporate filing and retrieval. One of her key accomplishments has been developing a detailed manual covering the steps required for authentication/legalization of documents and keeping the information current.

Her experience as a trainer started in Puerto Rico in 2003 when she was an instructor for the University of Puerto Rico. The courses she taught included Criminology, Social Sciences and Introduction to Legal Concepts. She spearheaded the Continuing Education Department’s implementation of new teaching methodology for existing courses.

Ms. Varela also has a solid legal background. She was a practicing attorney in Puerto Rico, where she worked for a major law firm practicing corporate law. She was responsible for drafting and filing all of the firm’s business formation documents with the Puerto Rico Secretary of State. Ms. Varela recently passed the New York Bar Exam and her admission is pending.

She is a member of the American Bar Association. Ms. Varela holds a Bachelor’s degree in Psychology and a Juris Doctor from the University of Puerto Rico.



IMMIGRATION

Seminar I-B

Hot Topics in Immigration for Employers and Individuals

This session will focus on different topics that are essential for today's immigration paralegal. The presenters will discuss trends in worksite enforcement, including I-9s, the Department of Labor and how the Fraud Detection & National Security (FDNS) is reviving the H-1B site visit program. There will be discussions regarding how E-Verify will be coming to your neighborhood soon, the use of Validation for Business Enterprises (VIBE) in I-140 adjudication and the increasing role of social media in United States Citizenship and Immigration Services (USCIS), Immigration and Customs Enforcement (ICE) and Department of State (DOS) cases. The presenters will provide tips for successful consular processing with the National Visa Center (NVC) and the Kentucky Consular Center (KCC).

1.25 NFPA CLE Credits

WENDY CASTOR HESS, ESQUIRE

Goldblum & Hess

Wendy Castor Hess is a founding partner in the Immigration law firm of Goldblum & Hess and has been practicing immigration law for over 30 years. She currently serves as President of HIAS Pennsylvania, as Chair of the Philadelphia Bar Association's Immigration Committee, as Co-Vice Chair of the Pennsylvania Bar Association's Immigration Section and as Co-Chair of the AILA (American Immigration Lawyers Association) Philadelphia USCIS (U.S. Citizenship and Immigration Service) liaison committee. Ms. Hess also served as a member of the AILA U.S. Department of Labor Liaison Committee from June 2009-June 2010. A former staff Attorney with the U.S. Department of Justice, Board of Immigration Appeals, Ms. Hess is a frequent speaker at national immigration conferences and the author of numerous immigration articles, especially in the medical and employer sanction fields. Her practice focuses on representing corporate employers in the medical, pharmaceutical, IT and university communities. She also serves as counsel to the Mexican Consulate in Philadelphia and as a weekly columnist for *Al Dia*, the largest Spanish language newspaper in the Philadelphia area. Ms. Hess is listed in Best (Immigration) Lawyers in America, the International Who's Who of Corporate Immigration Lawyers, as well as in Pennsylvania Super Lawyers.

YUAH JESSICA CHOI, ESQUIRE
Goldblum & Hess

Ms. Choi has been an Associate with Goldblum & Hess since 2006. She possesses vast experience with all aspects of both non-immigrant and immigrant visas, and currently handles employment-based non-immigrant and immigrant as well as family-based cases. Ms. Choi is the incoming Vice Chair of AILA's Philadelphia Chapter, and previously served as the Treasurer, Secretary, New Member's Division Chair, Annual CLE Conference Co-Chair and CLE Liaison. In addition, she has lectured on business immigration topics and has been published in one of the Korean daily newspapers in the Philadelphia area. Furthermore, she has published articles pertaining to business immigration law including "*Foreign Worker-Related Issues to Spot Before Commencing a PERM Case*" in 'The David Stanton Manual on Labor Certification, Successful Strategies under PERM' (AILA, Winter 2008).

Prior to joining Goldblum & Hess, Ms. Choi gained legal experience interning at the United States Equal Employment Opportunity Commission in Honolulu, Hawaii, as well as various law firms in Hawaii and New York. In addition, she worked as the Executive Assistant to the Korean Ambassador to the United Nations before going to law school where she assisted the Foreign Student Advisors at the University of Hawaii. She is fluent in Korean and is currently an officer of the Korean American Association of Greater Philadelphia. Ms. Choi received her J.D. from the William S. Richardson School of Law of the University of Hawaii in 2005 where she was the Editor-in-Chief of the Asian-Pacific Law & Policy Journal, and she received her Bachelor of Arts degree from the University of Pennsylvania. She is admitted to the Bars of New York and Hawaii.

ERIN LOVEJOY, PARALEGAL
Goldblum & Hess

Erin Lovejoy has been a paralegal at Goldblum & Hess for two years, where she comprises the family-based immigration "department". She earned a B.A. in Spanish, Linguistics and International Studies from the University of North Carolina at Greensboro and, in August 2011, will graduate with a Masters of Education from Temple University. She is fluent in Spanish and Italian, but has also studied French, Greek and Hebrew. She absolutely loves her job and the outlet it provides for her love of writing, researching, customer service, independence, helping those in need and exercising determination and perseverance when looking for solutions to problems!



LEGAL WRITING

Seminar I-C

Effective Legal Writing for Dispositive Motions

This course will focus on the proper writing techniques for motions wherein the moving party is seeking to preclude the non-moving party from proceeding to verdict from the finder of fact. Summary Judgment motions, compulsory non-sit motion, post trial motions and the like will also be discussed. The do's and don'ts of writing motion from a judge's perspective

1.25 NFPA CLE Credits

HONORABLE JOHN MILTON YOUNGE Judge, Court of Common Pleas of Philadelphia

Judge John Milton Younge, a native Philadelphian, was elected to a ten year term on the Court of Common Pleas in 1995 and was re-elected in 2005. Raised in the southwest section of the city, he is a product of the Philadelphia Public School system and a member of the 232nd graduating class of Central High School in 1973. Judge Younge earned a degree in Business Administration from Boston University in 1977 and in 1981, he received his Juris Doctor Degree from the prestigious Howard University School of Law. His previous employment was Deputy Executive Director and General Counsel, Redevelopment Authority of Philadelphia (1985 to 1995), Attorney and Counselor at Law (1982 to 1985), and he also had his own community based, private law practice. He continues to teach legal education for judges and lawyers and is an adjunct professor at the Delaware County Community College.

His Civic/Church involvements are Chairman, Bd. of Directors of the West Philadelphia Community Mental Health Consortium; Chairman, Bd. of Directors of New Life Credit Union; Board Member of the Central High School Alumni; Member of the Omega Psi Phi Fraternity, Mu Omega Chapter; Chairman, Bd of Finance & the Deacon's Bd. of Sharon Baptist Church; & Bd. Member of Cobbs Creek Community Environmental Education Center – his professional involvements are Member, PA Conference of State Trial Judges; Candidate for Masters of Judicial Studies Degree National Judicial College, Reno, Nevada; Member, Clifford Scott Green Chapter, NBA Judicial Council; Pennsylvania Bar Association, House of Delegates; Philadelphia Bar Association

Judge Younge resides in the Wynnefield section of Philadelphia with wife, Joy May Brown-Younge and their three children, Jessica, James and Jennifer.

TECHNOLOGY

Seminar I-D

Wining Litigation Technology (ParaCon/Sanction)

This seminar is intended to provide practical and useful suggestions for paralegals assisting practicing litigators, and to provide valuable techniques and guidelines to be used in the courtroom. After a brief overview of traditional courtroom presentation techniques to address their strengths and weaknesses, there will be an analysis of tools designed to enhance traditional presentation methods. Trial presentation software, timeline software, 3-D animation, proper digital formats, coordination with courtroom staff and other logistical considerations to be addressed prior to trial to ensure the successful deployment of technology. Participants will learn how to recognize how people process data and how to tailor the display of evidence to achieve maximum information retention. The effect of technology, including costs, the perception of its use by jurors and the efficiency it provides when properly implemented will be discussed. Contingency plans will be explored with regard to preparing for the unexpected and reviewing important backup measures to keep technology running smoothly throughout trial. Participants will see PowerPoint sample slides illustrating thematic techniques that can be used to effectively communicate information and how trial presentation software can be used in the courtroom to bring documents and images to life.

1.25 NFPA CLE Credits

JENNIFER McCOY

National Litigation Services Coordinator
Sanction Solutions/Alexander Gallo Holdings

Ms. McCoy is the National Litigation Services Coordinator at Sanction Solutions, a trial presentation software company, in Washington, D.C. Ms. McCoy is a seasoned legal industry professional with deep experience working for litigation and case review teams within major law firms. She recently moved to the solutions provider side of the industry to help firms implement and utilize the best trial support software. Ms. McCoy has extensive knowledge and experience using the leading litigation and trial software tools. She has applied her skills to develop firm specific litigation hosting solutions to match case work flows and database access needs. She has also been responsible for the design and implementation of training programs to ensure the highest level of adoption for implemented solutions.

McCoy holds a Bachelor of Arts in English Literature from George Mason University. She received her Paralegal Certification in International Business Law from the Institute of Paralegal Studies, American University in Paris, France in 1993. In 2007, she earned her Master's in Project Management from DeVry University and is currently pursuing her Project Management Professional (PMP) Certification as a member of the Project Management Institute.



Session II

10:45 a.m. to 12:00 p.m.

FINANCIAL PLANNING

Seminar II-A

Financial Management Basics

Personal finance and investing can provide many challenges for individuals who try to maneuver without proper guidance. This seminar will focus on the basics of financial management. Understanding how the financial industry works will help prepare you to interact with your clients who may need assistance after your firm's legal service is completed. Mr. Pearson will provide some useful information on how to choose an investment professional if your clients need planning advice.

1.25 NFPA CLE Credits

SEAN MICHAEL PEARSON, CFP®
Financial Advisor, Assistant Vice President
PNC Investments, LLC member FINRA and SIPC

Mr. Pearson is a Certified Financial Planning professional. As a Financial Advisor, he works with individuals and small businesses to develop investment, retirement and insurance plans. He has 15 years of experience working with retail banking and investment clients. Mr. Pearson received his undergraduate degree from Chestnut Hill College, and his MBA from Temple University. Additionally, Mr. Pearson has served as a member of the PA Air National Guard for 14 years and is currently assigned as the unit's Public Affairs Officer.

LITIGATION

Seminar II-B

Avoidable Consequences: Minimizing Risks of Litigation

Stephanie Resnick and Christine Soares, Esquires of Fox Rothschild LLP will present “Litigation-Avoidable Consequences: Minimizing Risks of Litigation.” The presentation will explore key issues in minimizing the risks of litigation with particular attention to recent developments in e-discovery. Topics to be covered include: an e-discovery update; preservation holds; gathering data and documents; spoliation of evidence; general risk avoidance; and dealing with the media and crisis communications.

1.25 NFPA CLE Credits

1.00 PA CLE Board Credits

STEPHANIE RESNICK, ESQUIRE

Fox Rothschild LLP

Ms. Resnick is a partner with the Philadelphia firm of Fox Rothschild LLP and chairs their Litigation Department. She graduated from Villanova University School of Law in 1984. Ms. Resnick is the recipient of numerous awards, most recently receiving one of the Philadelphia Bar’s most prestigious accolades – the 2010 Sandra Day O’Connor award. For 25 years, Ms. Resnick has been extensively involved in the Philadelphia Bar Association. She is a past chair and former member of their Board of Governors. In 2009, she was appointed and currently serves on the Justice William J. Brennan Jr. Distinguished Jurist Award Committee, which recognizes a jurist who adheres to the highest ideals of judicial service.

From August 2009 to August 2010, Ms. Resnick served as the Third Circuit Representative to the ABA Standing Committee on the Federal Judiciary. This prestigious 15-member standing committee evaluates candidates for the federal judiciary at the U.S. District, U.S. Circuit and U.S. Supreme Court levels. During her tenure, over 75 prospective nominees were vetted along with two Supreme Court Justices.

Ms. Resnick provides pro bono legal work for the Support Center for Child Advocates and volunteers for many other nonprofits. She previously chaired Women’s Way, the nation’s oldest and largest funding federation of services for women and children. Ms. Resnick writes and speaks on a variety of topics frequently. Her full biography is located at <http://www.foxrothschild.com/attorneys/bioDisplay.aspx?id=3816>.

CHRISTINE SOARES, ESQUIRE

Fox Rothschild LLP

Ms. Soares is an associate with Fox Rothschild LLP. She is a member of the firm’s Litigation Department; her practice focuses on commercial, bankruptcy and real estate litigation for clients ranging from private individuals to Fortune 1000 corporations. Ms. Soares is admitted in both Pennsylvania and New Jersey and practices in both state and federal courts, as well as in arbitration forums. She has also been admitted to the U.S. Court of Appeals, Third Circuit and the U.S. District Court (Eastern District of Pennsylvania and District of New Jersey).

She is actively involved in handling pro bono matters. Ms. Soares has represented state and federal prisoners in federal civil rights actions through the United States District Court for the Eastern District of Pennsylvania’s Prisoner Civil Rights Panel. Ms. Soares is a 2006 graduate of Villanova University School of Law. She is a member of the Pennsylvania and Philadelphia Bar Associations and is active with Women’s Way, currently serving on the Ernesta Drinker Ballard Book Prize Committee. A complete biography for Ms. Soares is located at: <http://www.foxrothschild.com/attor>



ETHICS

Seminar II-C

Use your Paralegals the Right Way!

This course is intended for both paralegals and attorneys who want to maximize the appropriate use of the non-attorney staff in their office within ethical guidelines. We will start with a quick review of the relevant Disciplinary Rules and then concentrate on the two “hot button” topics most frequently discussed in this area: Unauthorized Practice of Law and Duty to Report Misconduct. We will also incorporate some interactive exercises during the seminar and encourage participation.

1.25 NFPA Ethics CLE Credits

JANE BRESLIN JACOBS, ESQUIRE

Community College of Philadelphia
Associate Professor and Internship Coordinator

Jane Breslin Jacobs, Esquire is an Associate Professor and Internship Coordinator at the Community College of Philadelphia, an ABA-approved Paralegal Studies Program. She previously worked as corporate counsel to CIGNA Corporation and First Fidelity Bancorporation, as well as serving as an Assistant Attorney General for New York State. She serves as a frequent writer and lecturer on issues concerning paralegals.

PRO BONO

Seminar II-D

Pennsylvania Innocence Project: Training for Volunteers

This training begins with an introduction to wrongful convictions and exonerations since 1989, and an overview of the criteria for choosing cases and case flow at the Pennsylvania Innocence Project. The trainer will present objective factors to determining innocence, such as use of eyewitness testimony at trial; as well as subjective factors, such as evidence not matching descriptions or actions. Proving innocence, including how the Post Conviction Relief Act, post-conviction DNA testing comes into play and requirements for presenting new evidence in post-conviction proceedings will be covered. Confidentiality is a key part of volunteering at the entry level, which includes screening letters, evaluating questionnaires and appellate materials, and reviewing and completing files for review by a Project attorney/committee.

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MARISSA BOYERS BLUESTEIN, ESQUIRE

Legal Director, Pennsylvania Innocence Project

Marissa Boyers Bluestine is the Legal Director for the Pennsylvania Innocence Project. Ms. Bluestine has worked in both the private and public sectors—as a litigation associate at Duane Morris and as an Assistant Defender with the Defender Association of Philadelphia for over 10 years. At the Defender Association, Ms. Bluestine focused particularly on issues related to innocence reform and confrontational rights in the wake of Crawford. She also shepherded the Defender reaction to the NAS Report, *Strengthening Forensic Science in the United States: A Path Forward*. As the Legal Director of the Pennsylvania Innocence Project, Ms. Bluestine oversees all legal work undertaken by the Project, which works to exonerate those who were wrongfully convicted of crimes they did not commit. In addition, Ms. Bluestine works to coordinate the policy initiatives of the Pennsylvania Innocence Project geared toward reforming the criminal justice system to prevent wrongful convictions from occurring. As an adjunct professor at Temple University Beasley School of Law, Ms. Bluestine teaches a seminar in trial advocacy as well as a clinical program with the Pennsylvania Innocence Project. In April, 2010, the *Legal Intelligencer* included Ms. Bluestine in its biennial list of “Women of Distinction.”

Ms. Bluestine is a graduate of Trinity College in Hartford, Connecticut (1989) and a cum laude graduate of Temple University School of Law (1995), where she served as Managing Editor of the *Temple Political & Civil Rights Law Review* and was a national quarterfinalist in the National Trial Competition.



Session III

2:00 p.m. to 3:15 p.m.

LITIGATION

Seminar III-A

E-Filing in Philadelphia County – An Overview

The First Judicial District of Pennsylvania, Court of Common Pleas of Philadelphia, launched its Civil Electronic Filing System in August 2008. Effective January 5, 2009, the electronic filing of all civil matters in Philadelphia became mandatory. Anyone handling civil cases should be a registered user of the system. This course will provide in-depth instruction on the use of the electronic filing system, as well as any and all enhancements and processes added to the system since implementation. The electronic filing system was designed to allow for the filing of all civil cases and legal documents via the Internet from anywhere and at anytime using a personal computer. The system currently provides attorneys and litigants with unlimited online access to all papers and legal documents filed in their cases.

1.25 NFPA CLE Credits

DEBORAH E. DAILEY

Deputy Prothonotary and Chief Deputy Clerk of Courts

Deborah E. Dailey has thirty-one years of experience in court operations and administration. Presently, Ms. Dailey is the Deputy Prothonotary and Chief Deputy Clerk of Courts for Philadelphia. She began her career with the First Judicial District of Pennsylvania in 1979 as Legal Secretary to the Chief Counsel of the Legal Unit of the Domestic Relations Section. She went on to serve as Judicial Secretary to the Honorable Edwin S. Malmed. Thereafter, she served for 13 years as Executive Secretary to the Chief Deputy Court Administrator of the First Judicial District. Prior to her current position, she served as Director of the Office of Civil Administration/Civil Motions Program for nine years and thereafter as Senior Staff Advisor to the Court Administrator of the First Judicial District. Ms. Dailey is a member of the Mid-Atlantic Association for Court Management (MAACM), the National Association for Court Management (NACM), the Pennsylvania Association for Court Management (PACM), Pennsylvania Association of Prothonotaries & Clerks of Courts, and the International Association of Clerks, Recorders, Election Officials & Treasurers (IACREOT). She holds a Certified Court Manager degree from the Institute for Court Management of the National Center for State Courts.

ESTATES AND TRUSTS

Seminar III-B

What's New – A Review of Changes in Pennsylvania and Federal Law Affecting Estate and Trust Administration

On December 17th, 2010, President Obama signed into law the Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010 (“2010 Tax Act”), creating big changes in the federal estate tax, gift tax, and GST tax exemptions. How to handle estates of decedents that died in 2010 – carryover basis election versus default estate tax rule, construction issues, “portability” between spouses, deadline anomalies and disclaimers. Learn what changes should be reflected in estate planning documents in light of the 2010 changes, and also gift tax and generation skipping transfer tax impact and planning opportunities. Any new updates to the Pennsylvania Uniform Trust Act? Ms. Stephenson will give the Trust and Estates paralegal a broad overview of these changes and what we may expect in 2012 and beyond.

1.25 NFPA CLE Credits

KATHLEEN A. STEPHENSON, ESQUIRE

Of Counsel, Pepper Hamilton LLP

Ms. Stephenson is Of Counsel with Pepper Hamilton LLP, resident in the firm’s Philadelphia office, where she concentrates her practice in the fields of estate planning and administration and related tax work and fiduciary representation. She serves on her firm’s Professional Responsibility Committee, Pro Bono Committee and Paralegal Committee.

Ms. Stephenson is a Fellow in the American College of Trust and Estate Counsel. She was an adjunct professor in the graduate tax program of Temple University Beasley School of Law School (1999-2003), has served as associate editor of the ABA Section of Taxation Newsletter and has published in the Journal of Taxation and in Estate Planning.

An active member of the Philadelphia Bar Association, Ms. Stephenson is a past Chair of its Probate and Trust Law Section. In the past, she has served as the Chancellor’s nominee to the section’s Executive Committee, as chair of the section’s Legislative Committee and as chair of its Rules and Practice Committee. Ms. Stephenson also is a past member of the Board of Directors of the Philadelphia Estate Planning Council.

Within the community, Ms. Stephenson is a member of the Committee of 70, a member of the Board of Directors of the Charlotte Cushman Foundation and of The Widow’s Corporation, a member of the Planned Giving Committees of the Philadelphia Orchestra and of Children’s Hospital of Philadelphia and sits on the Vestry of St. Peter’s Episcopal Church.

Ms. Stephenson received her J.D. from Duke University School of Law, an M.A. (History) from the University of Memphis and B.A. from Clarke College. She is admitted to practice in Pennsylvania and New York.



INTELLECTUAL PROPERTY

Seminar III-C

America Invents Act: How the New Law Impacts Your Patent Practice

The America Invents Act (AIA) was passed last Thursday and was sent to the President for signature. AIA is the most significant patent reform legislation in decades. Ms. Featherman will explore how the AIA would transition the U.S. patent system from a first-to-invent system to a first-inventor-to-file system. The first-inventor-to-file system would give inventorship priority to the first individual inventor to file a patent application for a particular invention. The system follows the procedures already in place in Europe but would contrast sharply with the United States' current system, which gives priority to the first inventor in some circumstances even if that inventor is not the first to file an application with the U.S. Patent and Trademark Office. Some of the new changes include:

- Section 3: First Inventor to File
- Section 4: Inventor's Oath or Declaration
- Section 6: Post-Grant Review Proceedings
- Section 7: Patent Trial and Appeal Board
- Section 8: Pre-issuance Submissions by Third Parties
- Section 15: Best Mode Requirement
- Section 16: Marking

1.25 NFPA CLE Credits

ELIZABETH LAI FEATHERMAN, ESQUIRE

Cozen O'Connor

Ms. Featherman joined the firm's Philadelphia office in 2011. She practices with the Intellectual Property group, counseling clients in the technology industry, including telecommunications, medical device manufacturers, computers hardware and software, and manufacturers of optics and laser systems.

Ms. Featherman has experience handling patent prosecution and litigating patent infringement, trademark infringement, and misappropriation of trade secrets. She has also assisted in developing patent portfolios, negotiated and drafted various intellectual property agreements, conducted due diligence, and prepared non-infringement and invalidity opinions.

Ms. Featherman earned her law degree from Franklin Pierce Law Center and was student editor of the Franklin Pierce Law Center Germeshausen Center for the Law of Innovation and Entrepreneurship Newsletter. She earned a certificate for completing the Chinese Intellectual Property Summer Institute program at Tsinghua University School of Law in Beijing.

Elizabeth received her master's degree from the University of Pennsylvania in mechanical engineering and was a doctoral candidate there as well. She received her bachelor's degree from the Massachusetts Institute of Technology.

Ms. Featherman is admitted to practice in Massachusetts, Pennsylvania, and New

Jersey, and before the U.S. Patent and Trademark Office. She is fluent in written Chinese and Cantonese, and proficient in Mandarin.

LITIGATION

Seminar III-D

QUI-TAM

Whistleblower (“Qui Tam”) cases are complex matters which often require extensive communication and coordination with the United States Department of Justice, local United States Attorneys Offices, all 50 state Attorneys General Offices, the Food and Drug Administration, the Office of Inspector General, and numerous other federal and state agencies. Through this course you will learn how Qui Tam cases are litigated. It’s an interesting area of law. Learn the ins and outs from two of Philadelphia’s most prominent attorneys in this field.

1.25 NFPA CLE Credits

1.00 PA CLE Board Credits

SHERRIE R. SAVETT, ESQUIRE

Berger & Montague, P.C.

Sherrie R. Savett, Chair of the Securities Litigation Department and member of the Management Committee at Berger & Montague, P.C. has practiced in securities litigation and class actions since 1975. Seven securities class actions in which she served as lead counsel are among the 100 largest settled in the history of federal securities laws. Ms. Savett has advanced investor protection by helping to establish several significant legal precedents, one being – the first ever in a federal appellate court – the holding that municipalities are subject to the antifraud provisions of SEC Rule 10b-5 under § 10(b) of the Securities Exchange Act of 1934. *Sonnenfeld v. City and County of Denver*, 100 F.3d 744 (10th Cir.1996).

Ms. Savett is a frequent author and lecturer on prosecuting shareholder and consumer class actions. She has written numerous articles on securities and complex litigation issues. She has lectured at the Wharton School of the University of Pennsylvania and at the Stanford Law School, and has been a presenter and panelist for the Practising Law Institute’s Securities Litigation and Enforcement Institute annually since 1995. She earned her J.D. from the University of Pennsylvania Law School, and a B.A. Summa Cum Laude with Distinction in English Literature from the University of Pennsylvania, where she was elected a member of Phi Beta Kappa.

Ms. Savett is also a distinguished business and community leader. Her full biography is located at: http://www.bergermontague.com/bios/attorney_bio.cfm?id=28.

GARY L. AZORSKY, ESQUIRE

Berger & Montague, P.C.

Gary L. Azorsky joined Berger & Montague, P.C. as a shareholder of the firm in 2002 and concentrates his practice on qui tam litigation in addition to commercial class actions and complex commercial litigation.

Previously, Mr. Azorsky had been actively involved in groundbreaking civil rights, commercial and intellectual property litigation, including Internet and software industry-related litigation, as a partner at the Philadelphia firm of Mesirov Gelman Jaffe Cramer & Jamieson, and later as a partner at the Philadelphia firm of Schnader Harrison Segal & Lewis. Since joining Berger, Mr. Azorsky has focused primarily on qui tam litigation, particularly in the context of the health care industry. He works extensively representing whistleblowers in both state and federal court. A series of False Claims Act cases against drug companies for fraudulent Medicaid and Medicare drug pricing has led to recoveries of over \$200 million, including a \$150 million settlement with GlaxoSmithKline PLC.

Mr. Azorsky is admitted to the bars in both Pennsylvania and New Jersey. He is a graduate of The University of Pennsylvania (B.A. 1980) and Cornell University Law School (J.D. 1983)



Session IV

3:30 p.m. to 4:45 p.m.

ESTATES AND TRUSTS

Seminar IV-A

The ABCs of Estate Planning To Protect Your Family and Assets

A seminar designed for all paralegals to learn how to plan for, and protect their family. No matter your net worth, it is important to have a basic estate plan in place. Creating a comprehensive estate plan can help alleviate many of your loved ones burdens, when dealing with a family crisis. Hear a discussion on the Estate Mistakes of the Rich and Famous, or “What Not To Do.” Learn the basics of Wills, Trusts, Power of Attorney, Advance Medical Directive (Living Will), Annual Exclusion Gifting, Charitable Giving, Tax and Estate Planning for Pension and IRA Assets and Irrevocable Life Insurance Trusts. Ms. Sheffield will also have a question and answer session, so bring your questions.

1.25 NFPA CLE Credits

CAROLE B. SHEFFIELD, ESQUIRE Reed Smith LLP

Ms. Sheffield’s practice includes a broad range of legal disciplines within Taxation and Wealth Planning. On an ongoing basis, she provides tax advice and wealth planning services to high net worth individuals, financial institutions, non-profit corporation and closely-held businesses. Ms. Sheffield’s legal skills are represented in all areas of estates’ and trusts’ planning, administration and litigation, as well as formation and implementations of charitable (501(c)(3)) tax exempt organizations, for-profit partnerships and limited liability companies and with extensive real estate transactions’ experience.

Ms. Sheffield regularly writes and publishes course materials for continuing legal education courses she teaches in ethics, fiduciary taxation, trusts and estates planning, administration and litigation and Federal and Commonwealth tax-exempt/non-profit taxation. In Spring 2008, she presented “Tax Tips” on WHYY Radio as an ongoing series of new presentations. Ms. Sheffield also served as an on-site consultant to the Center for Community Nonprofit Organizations (CCNO) at Temple University’s Beasley School of Law and as an adjunct professor for the Integrated Transaction Program (ITP), where, as a JD candidate, she assisted Professor Nancy J. Knauer in writing the initial ITP course materials.

PROFESSIONAL DEVELOPMENT

Seminar IV-B

Strategic Career Planning for Paralegals

This course is a live presentation of the two part Strategic Thinking for the Paralegal series written by Tausha P. Major and published in the Winter and Spring 2010 editions of The Philadelphia Forum. The presenter will provide effective guidelines for paralegals to use in order to develop a clear path to success. Session topics include: the effectiveness of a SWOT Analysis in career planning; developing a personal marketing pitch; and creating a marketing buzz. Essentially, attendees will walk away with the tools needed to strategically enter and/or advance in the legal industry.

1.25 NFPA CLE Credits

TAUSHA P. MAJOR, M.B.A.
Shaffer & Gaier, LLC

Ms. Major is an out-of-the-box overachiever in the pursuit of excellence. She is currently a senior paralegal at a boutique firm in Philadelphia. With more than 20 years of paralegal experience, she Chairs the Professional Development Committee of The Philadelphia Association of Paralegals and sits on its Board of Directors. Ms. Major is also an adjunct faculty member in the Legal Studies Department for Peirce College. She holds a Paralegal Certificate, a B.S. in Business Communications and an MBA in Management. She expects to pursue a Ph.D. in Organizational Leadership in the near future.



FAMILY LAW

Seminar IV-C

What's new in Custody, Support, Adoption, Separation and Domestic Violence

This session will provide an overview of changes to Pennsylvania's custody laws effective January 2011 (including use of parenting plans and new procedure for relocation cases); Pennsylvania's current support guidelines effective May 2010 (including the elimination of Melzer in high income cases); changes to Pennsylvania's adoption laws effective April 2011 (future contact agreements now binding); economic remedies for non-married couples (partition, child support, custody); and a domestic violence overview (October is Domestic Violence Awareness month).

1.25 NFPA CLE Credits

1.00 PA CLE Board Credits

MARGARET KLAW, ESQUIRE

Berner Klaw & Watson LLP

Ms. Klaw is a partner with the Philadelphia firm of Berner Klaw & Watson LLP, which concentrates its practice in all aspects of family law, including divorce and custody mediation, and in the representation of plaintiffs in personal injury cases arising from domestic violence, sexual assault and child abuse. Ms. Klaw, a 1984 graduate of Northeastern University Law School, was former litigation coordinator at the Women Against Abuse Legal Center in Philadelphia. She has held numerous positions within the Philadelphia Bar Association, including chair of the Family Law Section, member of the Board of Governors, member of the Commission on Judicial Selection and Retention, co-chair of the Women's Rights Committee, member of the Family Law Section Executive Committee, co-chair of the Committee on the Legal Rights of Unmarried Cohabitants, and co-chair of the Domestic Violence Committee.

Ms. Klaw currently serves on the legal advisory board for Mazzoni Center Legal Services and on the board of Settlement Music School, Germantown Branch. She was a past board member and officer of Equality Advocates Pennsylvania, past president of the board of the National Clearinghouse for the Defense of Battered Women, and past member of the board of First Person Arts. Ms. Klaw has been a consultant in both litigation and policy matters to the Pennsylvania Coalition Against Domestic Violence, and writes and lectures extensively on a variety of family law topics.

SOCIAL MEDIA

Seminar IV-D

Playing the Social Media Game: The Best Offense is a Good Defense

In today's tough economic climate everyone needs to take a proactive role in marketing themselves. It's tough out there, trying to find work or change careers. You increase your chances of success if people have heard of you. The internet and social media can help you be seen. This session will inform and provide details on how to build a profile, get connections and find out what's happening in your area. When seeking employment, it is important that your prospective employer sees your best game face on the internet. You will learn the best techniques for using social media, including Linked In, Facebook, Monster, Career Building, Twitter and Blogs to your advantage.

1.25 NFPA CLE Credits

BABETTE PACE

Paralegal, City of Philadelphia, Code Enforcement Unit

Ms. Pace is a Real Estate Paralegal for the City of Philadelphia in the Code Enforcement Unit with over six years of experience in this role. She holds a Bachelor of Science degree from Temple University, an Associates' degree from Peirce College and a paralegal certificate from Peirce College. She is a member of NFPA® Strategic Planning Committee and is NFPA®'s Student Growth Coordinator. She is heavily involved with Philadelphia Association of Paralegals in various roles such as co-Chair of the Technology Committee, Co-Chair of the Intellectual Property Committee and an active participant on the Education, Pro Bono, Professional Development and Public Relations & Marketing Committees. She is a Paralegal Advisory Board Member and a Paralegal Scholarship Review Board member with over four years of service in these capacities. She also volunteers at her other alma mater Temple as a mentor. She has been a mentor for Temple for over two years.



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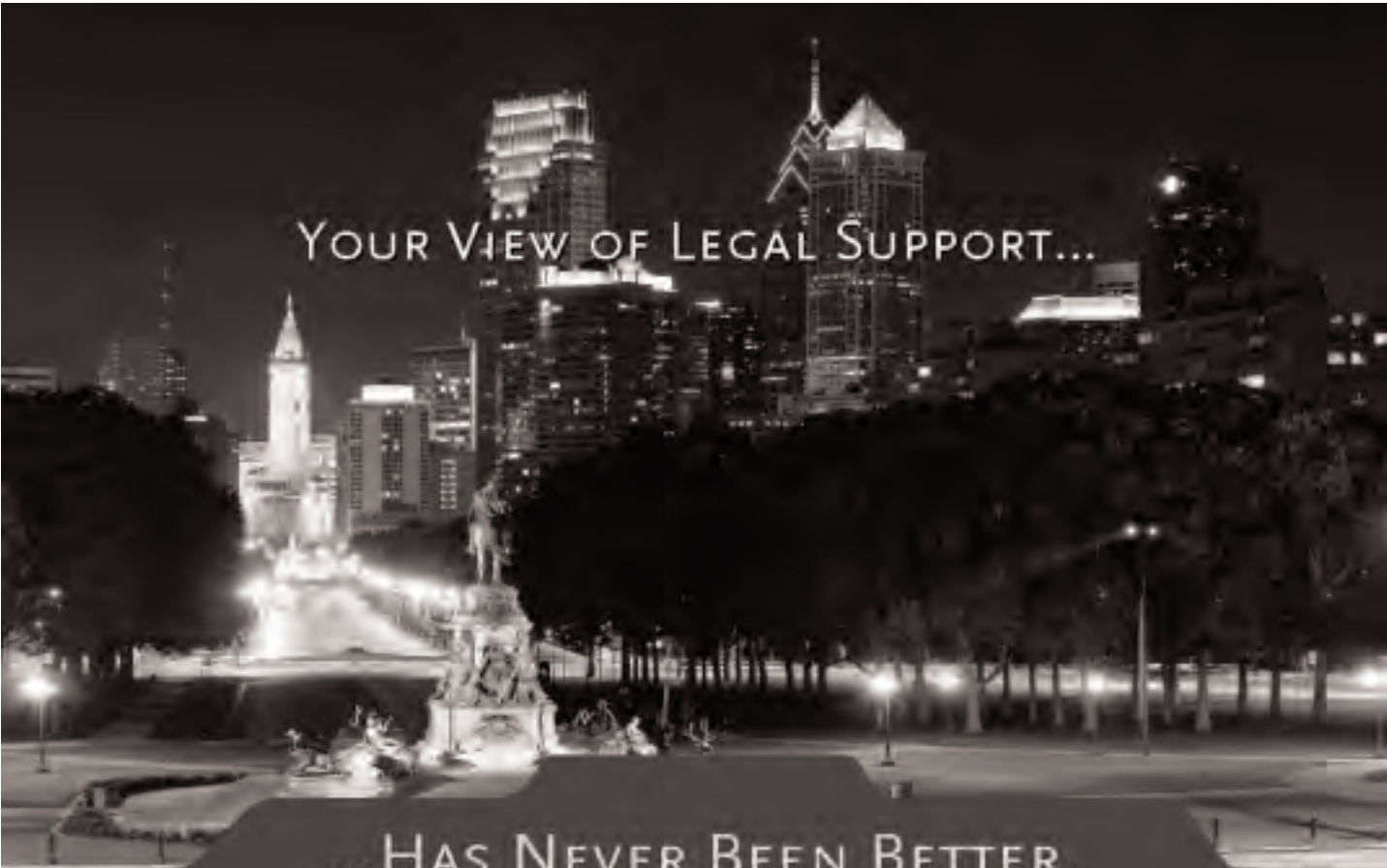
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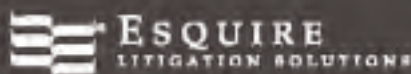
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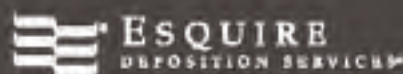
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Follow I- 95 South to Central Philadelphia and take Exit 22 to 676 West. Follow 676 West for approximately one mile to the Broad Street exit. This will automatically put you onto 15th Street, heading South. Go ten lights to Locust Street and turn left. Go one block to Broad Street, turn left and proceed immediately into the center lane. Make a left into the garage for self-parking, or into Chancellor Court for valet parking and unloading luggage and / or passengers.

From Points North via New Jersey Turnpike (New York And Northern New Jersey)

Follow the New Jersey Turnpike to Exit 4, Route 73 North. Route 73 North (1.4 miles) will take you to Route 38 West (5.8 miles), which will lead you to Route 30 West. Follow Route 30 West (2.5 miles) to the Benjamin Franklin Bridge. After the bridge, stay to your left and follow the signs for 8th Street, Chinatown. At 8th Street, turn left and proceed for seven blocks to Walnut Street. Make a right onto Walnut Street, go six blocks to Broad Street, and turn left. Proceed immediately into your right hand lane for the hotel entrance. You may enter into the garage for self-parking, or into Chancellor Court for valet parking and unloading of luggage and / or passengers.

From Philadelphia Airport and Points South via I – 95

Follow I-95 North to Exit 17, Broad Street / Route 611. Travel 2.5 miles north on Broad Street, and the hotel will be on your left-hand side, between Locust and Walnut Streets. Enter the center lane to make a left into either the parking facility for self-parking or into Chancellor Court for valet parking and unloading luggage and / or passengers.

From Points East via the Walt Whitman Bridge and Atlantic City Expressway

Follow the Atlantic City Expressway to Route 42 North to the Walt Whitman Bridge. Cross the bridge and take the Broad Street exit. Follow Broad Street approximately 2 miles north to Locust Street. Just as you pass Locust Street proceed immediately into the center lane. From the center lane make a left into the garage entrance for self-parking or into Chancellor Court for valet parking and unloading luggage or passengers.

From Points West via the Pennsylvania Turnpike and Northeast Extension

Follow the PA Turnpike to Exit 326 (former Exit 24) / Valley Forge Interchange and follow to Route 76 East. From Northeast Extension, follow Route 476 South to Route 76 East. Take Route 76 East to Exit 345 (former Exit 38) / Route 676 East (This exit is from the left lane). Go approximately ½ mile to the Broad Street / Central Philadelphia exit. At the top of the Broad Street exit ramp make an immediate right onto 15th Street. Go nine lights to Locust Street, and turn left onto Locust Street. Go one block to Broad Street. Make a left onto Broad Street. Proceed immediately into the center lane to make a left into garage entrance for self-parking or into Chancellor Court for valet parking and unloading luggage and / or passengers.

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NAME OF REGISTRANT: _____

SESSION ONE **9:00 A.M. TO 10:15 A.M.** **LOCATION**

Please check one seminar from this session that you would like to attend

- _____ **Corporate Law:** Business Entity Governance and Compliance* *Clover Room*
Instructor: *Petrona Varela, Esquire*
- _____ **Immigration:** Hot Topics in Immigration for Employers and Individuals *State Drawing Room*
Instructors: *Wendy Castor Hess, Esquire, Yuah Jessica Choi, Esquire and Erin Lovejoy, Paralegal*
- _____ **Legal Writing:** Effective Writing for Dispositive Motions *Red Room*
Instructor: *Judge John M. Younge*
- _____ **Technology:** Winning Litigation Technology (ParaCon/Sanction) *Balcony Foyer*
Instructor: *Jennifer McCoy, Paralegal*

SESSION TWO **10:45 A.M. TO Noon** **LOCATION**

Please check one seminar from this session that you would like to attend.

- _____ **Financial Planning:** Financial Management Basics *Red Room*
Instructor: *Sean Michael Pearson, CFP®*
- _____ **Litigation: Avoiding Consequences:** Minimizing Risks of Litigation* *Clover Room*
Instructor: *Stephanie Resnick, Esquire and Christine Soares, Esquire*
- _____ **Ethics:** Use Your Paralegals the Right Way *State Drawing Room*
Instructor: *Jane Jacobs, Esquire*
- _____ **Pro Bono:** Pennsylvania Innocence Project: Training for Volunteers *Balcony Foyer*
Instructor: *Marissa Boyers Bluestine, Esquire*

SESSION THREE **2:00 P.M. TO 3:15 P.M.** **LOCATION**

Please check one seminar from this session that you would like to attend.

- _____ **E-Filing:** E-filing in Philadelphia County: An Overview *Clover Room*
Instructor: *Deborah E. Dailey*
- _____ **Estates & Trusts:** Changes in Pennsylvania and Federal Law Affecting Estate Administration ... *Red Room*
Instructor: *Kathleen A. Stephenson, Esquire*
- _____ **Intellectual Property:** America Invents Act:
How the New Law Impacts Your Patent Practice *State Drawing Room*
Instructor: *Elizabeth Lai Featherman, Esquire*
- _____ **Litigation:** Qui Tam* *Balcony Foyer*
Instructors: *Sherrie Savett, Esquire and Gary Azorsky, Esquire*



SESSION FOUR

3:30 P.M. TO 4:45 P.M.

LOCATION

Please check one seminar from this session that you would like to attend.

- _____ **Estates & Trusts:** ABCs of Estate Planning to Protect Your Family and Assets *Red Room*
Instructor: Carole B. Sheffield, Esquire
- _____ **Professional Development:** Strategic Career Planning for Paralegals *Clover Room*
Instructor: Tausha Major, M.B.A.
- _____ **Family Law:** What's New in Custody, Support, Adoption, Separation & Domestic Violence* *Balcony Foyer*
Instructor: Margaret Klaw, Esquire
- _____ **Social Media:** Playing the Social Media Game: The Best Offense is a Good Defense *State Drawing Room*
Instructor: Kimberly A. Walker, RP® and Babette Pace, Paralegal

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*This session has been PA CLE Board approved for 1.0 credit. PAP will cover the attendance fee for attorneys who attend this session.

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